

SAFETY CalPERS MEMBERS
REQUESTING RETIREMENT ESTIMATE(S)
AND PRINTING OF PAYROLL/PERSONNEL SCREENS

The purpose of this form is to request an estimate of retirement allowances. This estimate will be completed by the City of Long Beach Retirement Counselor. This form is not an application for retirement.

Part I – Employee Information (please print)

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Name	Date of Birth	
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Work Phone	Home Phone	Department/Bureau/Division

Part 2 – Estimate Information

Type of Estimate for Retirement Allowance: ☐ Service ☐ Industrial Disability ☐ Ordinary Disability

Projected Retirement Dates (Please put month, day, and year)

1) / /	2) / /	3) / /
month day year	month day year	month day year

A) Beneficiary's Date of Birth (optional, used to calculate option amounts for pension) / /

B) Were you ever a CalPERS retiree receiving a pension check? ☐ Yes ☐ No

C) Did you work at any time as a CalPERS Miscellaneous (non-safety) member? ☐ Yes ☐ No

D) Were you a CalPERS member prior to 07/01/82? ☐ Yes ☐ No

E) Have you worked for another agency covered by CalPERS? (If yes, refer to Part 4A) ☐ Yes ☐ No

F) Is there a community property claim against your retirement benefits? (If yes, refer to Part 4B) ☐ Yes ☐ No

G) Have you worked LESS THAN full time/full pay since 06/30/03? ☐ Yes ☐ No

H) How do you want the estimate sent? ☐ Interoffice-Conf. ☐ Mailed to Home ☐ Call when ready (ext. _____)

Part 3 – Survivor Continuance Information

A) Will you have been married at least one year prior to your tentative retirement date? ☐ Yes ☐ No

B) Do you have any unmarried children under age 18 or disabled prior to age 18? ☐ Yes ☐ No

C) Are either or both of your parents dependent on you for at least one-half of their support? ☐ Yes ☐ No

Part 4 – Notes

A) Please attach a copy of your 2003 CalPERS statement. If you do not and/or if the City's Retirement Counselor is unable to get the necessary information from CalPERS to run the estimate, it will be necessary to request an estimate from CalPERS. You may request "CalPERS Retirement Allowance Estimate Request" form from the City Retirement Counselor at (562) 570-6703 or access the CalPERS website at www.calpers.ca.gov or the City website at www.longbeach.gov/hr.

B) If there is a community property claim against your retirement benefits you will need to request an estimate from CalPERS. To request an estimate from CalPERS, see above.

C) Do you need forms to request additional CalPERS service credit which you may be eligible (e.g. military service, service prior to membership, redeposit of refunded member contributions, etc.) ☐ Yes ☐ No

YOU MUST NOW READ AND SIGN THE DISCLAIMER ON THE NEXT PAGE

DISCLAIMER

The retirement estimate program, which will be used by the City's Retirement Counselor to estimate your CalPERS Retirement Allowance, will be based on the information you provide on this form. The City's Retirement Counselor may, if necessary, access information maintained by CalPERS on your benefit formula(s), service credit, or salary history. However, if CalPERS does not provide the necessary information, it will be necessary to request an estimate from CalPERS.

Please remember that the results of this program are only an estimate and are provided to assist you with your financial planning. Your actual retirement benefit will be determined when you formally apply for retirement. CalPERS and THE CITY OF LONG BEACH ARE NOT RESPONSIBLE FOR THE ACCURACY OF ANY ESTIMATE PRODUCED BY THIS PROGRAM.

I have read the above disclaimer and understand that any retirement estimate I am given by an employee of the City of Long Beach is a rough estimate and its accuracy cannot be guaranteed.

Signature

Date

Forward completed form to:

**Mary Eme, Retirement Counselor
Human Resources, 13th Floor
or Fax (562) 570-5375**